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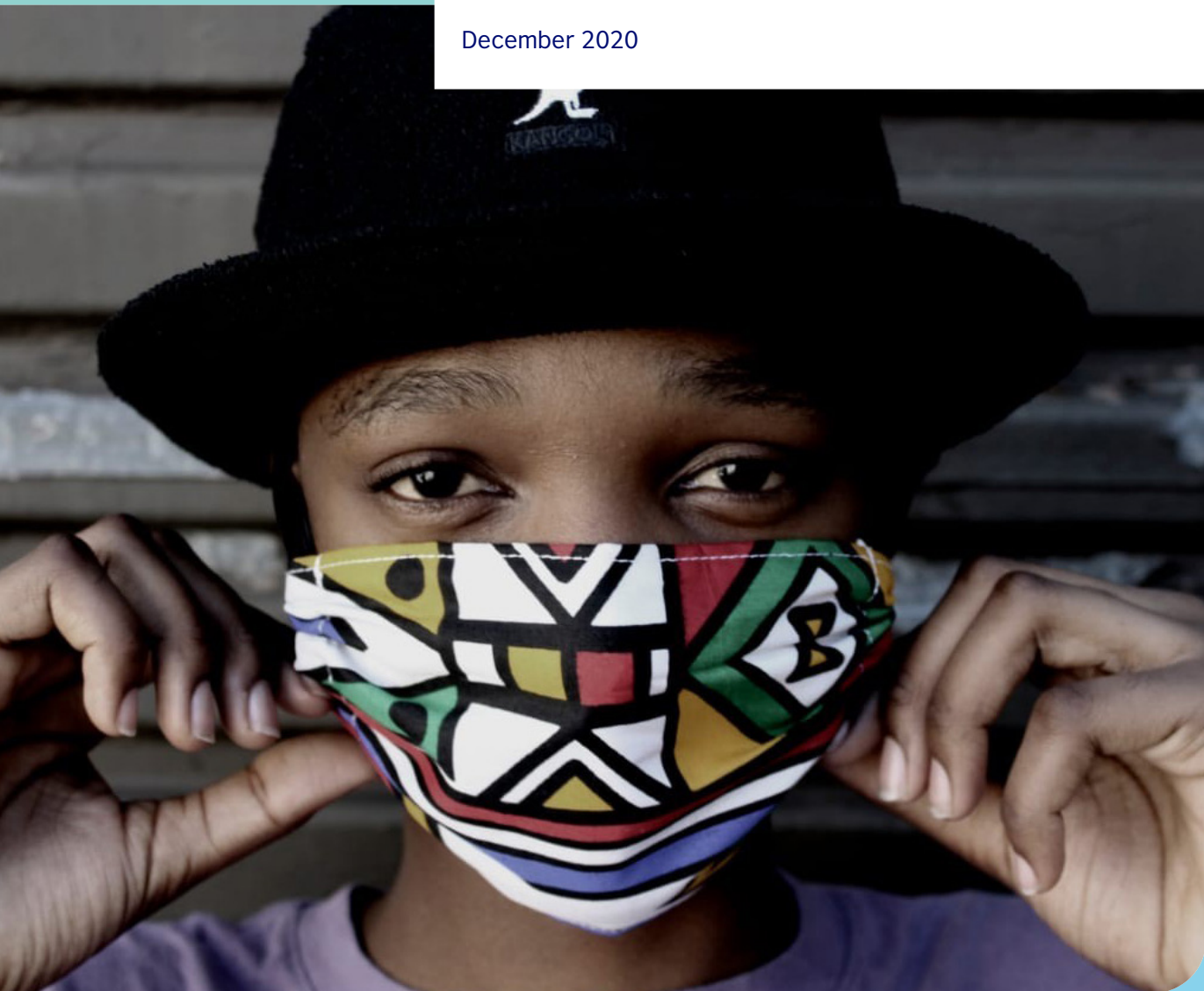
Social Enterprise UK

Innovation and resilience:

A global snapshot of social enterprise responses to Covid-19

December 2020

Foreword

Covid-19 has challenged businesses large and small to their limit. Profound shifts are taking place that have altered the fundamentals of many social enterprise business models – from the way we work, to the way consumers behave, and the reliability of established supply chains.

In this research we look at how social enterprises, broadly defined, are responding to these challenges. We are specifically interested in these businesses not only because of their significant financial contribution (social enterprises in sub-Saharan Africa may employ up to 41 million people[1]), but also because of the crucial roles they play in the social fabric of our communities and in efforts to avert a climate emergency.

If a social enterprise that is supporting women and girls into decent work, perhaps in a higher paid sector such as IT, does not survive this pandemic – then what happens to the women and girls who can no longer access this opening of economic opportunity?

If a social enterprise that creates products using recycled and reused materials is forced to close, then we are surely a step further away from our journey to a safe and sustainable future for our planet.

Our research shows that innovation and agility is more important now than ever. We know that this has historically been a strength, with research consistently finding that social enterprises outstrip the mainstream SME sector for the development of new products and services. And this has served social enterprises well, with two-thirds of social enterprises responding to our survey operating businesses that are significantly different compared to pre-Covid.

Less encouraging are the results for women-led and youth-led social enterprises where we see higher closure rates, greater reduction in activity and more limited access to government support. There is a clear warning sign here that the impact of the pandemic on social enterprises will significantly exacerbate existing inequalities.

Support from governments and other agencies has been vital to sustaining many social enterprises so far this year, but failure to address support gaps now will have serious and long-term implications for the sector, for inequality and for our global efforts against climate change.

We risk losing those very enterprises that we need at the centre of efforts to build back to a more inclusive and sustainable economy overall.

Paula Woodman, Global Head of Social Enterprise, British Council

[1] https://www.britishcouncil.org/society/social-enterprise/reports/ssa-jobs-report

Headlines

Social enterprises are agile:

two-thirds of social enterprises are running different businesses now compared to before the Covid-19 crisis, with new products and services, new trading models, and new beneficiaries and partners. Adapting to running online has been important: just over half of social enterprises have moved (more) of their provisions or services online.

Over a third of social enterprises said that there are no government support measures available to them. Lack of government support is most acute in South Asia and sub-Saharan Africa. Even in countries with higher levels of state support, there are gaps in provisions for social enterprises – specific social enterprise support is minimal and mainstream support is often hard to access.

Social enterprises are survivors: only one per cent of social enterprises reported that they have shut down, while seven per cent have had to close their services or provisions temporarily. But continued support to the sector is crucial: almost half of social enterprises are uncertain about their future growth and survival prospects.

Social enterprises working with the public sector, with other businesses and with non-profit organisations are all more positive about growth compared to those engaging with vulnerable/ disadvantaged groups and particularly compared to those targeting women. This indicates that concerns the crisis is exacerbating existing inequalities may be accurate.

Those uncertain about whether their business models will revert back to pre-crisis ways of operating are in turn least optimistic about stability or growth. By contrast, those with completely new permanent business models as a result of Covid-19 are by far the most optimistic group – four-fifths anticipate stability or growth in the next few months. Overall, new or increased products and services online and innovation in the form of new products and services are the two factors most associated with growth.

Women-led social enterprises seem to have been more adversely affected by the crisis. Almost a third have seen activity reduce and three per cent have permanently closed. They are also much more likely to say that government support isn't available to them.

Introduction

From 18 August to 25 September 2020, we ran a short global survey to ask social enterprises about how the Covid-19 crisis is affecting them. This study seeks to provide a snapshot global perspective of how the pandemic has been affecting social enterprise operations, staffing and growth prospects. We asked about needs and the support that has been received.

We received 334 responses to our original global survey. More information on the methodology can be found in Appendix 1. In addition, we have included findings from Social Enterprise UK's (SEUK) Social Enterprise Advisory Panel[2] (UK social enterprises; 263 respondents) and a British Council-funded State of Social Enterprise survey in Singapore[3] (143 respondents). Unless otherwise noted, the report refers to the full dataset of responses and is not weighted. Specifics of findings from the State of Social Enterprise survey in Singapore and from the subset of UK responses in the Social Enterprise Advisory Panel survey can be found in Appendix 1.

We have explored survey findings through three main lenses:

- the location of the respondent
- their organisational leadership profile (looking specifically at youth-led[4] and female-led organisations)
- expectations for the future (using growth expectations as a proxy).

Unless otherwise stated, results presented are for the full dataset of the main survey plus supplementary survey findings.

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[2] www.socialenterprise.org.uk/social-enterprise-advisory-panel

[3] Due to be published in early 2021, www.britishcouncil.org/society/social-enterprise/reports/state-social-enterprise

[4] Those led by people aged under 35

Where are survey respondents located?

The report presents findings aggregated into four global regions:

- South East Asia
- South Asia
- sub-Saharan Africa
- Europe+.[5]

A full list of countries from which we collected responses can be found in Appendix 2. We have also included distinct findings from Morocco (as it is aggregated within Europe for the purposes of the main findings and aligns quite closely to other European findings but is in a different region) and Jamaica[6] in Appendix 3.

Due to the sampling process where we contacted participants in previous research studies, there is bias in the findings towards countries where previous social enterprise research had been conducted by the British Council.[7]

Social enterprises in these studies are those businesses that self-identify as having both:

- significant traded income
- a business strategy that addresses both financial and social and/or environmental objectives.

This is deliberately broad in order to be inclusive, especially in countries where there is not yet an agreed definition of social enterprise or advanced support infrastructure.

Based on past social enterprise research and generic evidence, we might assume that there are some basic (albeit blunt and sweeping) assumptions for each of the regions covered in this report. For example, that Europe+ might have the strongest social enterprise support infrastructure, some of the more long-established organisations, and might be the most likely region to obtain government support. Yet from the survey there is a mixed picture in terms of resilience in the region, particularly for smaller organisations.

South East Asian social enterprise support is – in very broad terms – more nascent but is dynamic. Ecosystems and infrastructure are growing and are comparatively strong, and generic government support is often more significant than other parts of the world.

Again in very broad terms, social enterprises in sub-Saharan Africa might be used to being more self-reliant by necessity: they are less supported by the state and also less able to secure income from public sector sources prior to the crisis. Infrastructure is less developed overall in this region compared to other parts of the world and poverty levels are high, making general operating contexts more challenging for social enterprise pre-crisis. So while Covid-19 has not had the same effect on health and mortality as in other parts of the world, we might expect the crisis to hit sub-Saharan African social enterprises particularly hard financially.

Similar generalisations can be made for South Asia, where pre-existing operating contexts were overall challenging. State engagement might also be more limited and social enterprises likely to be both more resourceful and self-reliant, but also more vulnerable in crisis.

Main survey responses by region

Region	Percentage
Europe+ [8]	21%
South Asia	18%
South East Asia	24%
Sub-Saharan Africa	29%
Other	8%

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[5] Respondents were asked to report on one country if they have operations in several

[6] We had a reasonable response rate here, but not enough from nearby countries to aggregate and present regional findings

[7] www.britishcouncil.org/society/social-enterprise/reports/state-social-enterprise

[8] European findings are aggregated with findings from Morocco

Who are the survey respondents?

Most of the respondents to the survey are small social enterprises: 68 per cent have less than six staff and the median number of staff is three (although the average is 55, due to a small number of large employers). This reflects research findings about social enterprise across the globe more widely, which consistently finds a landscape dominated by start-ups. [9]

Staff by gender and age

Percentage of staff:	Female staff	Staff aged under 35
All	13%	13%
76–99%	16%	13%
51–75%	24%	20%
26–50%	26%	25%
1–25%	16%	19%
None	6%	9%

We asked about the demographics of leaders of the social enterprises that responded to the survey. Over half (52 per cent) of social enterprises have more than 50 per cent female staff, and 54 per cent of organisations are led by women. Forty-six per cent of respondents have more than 50 per cent of staff who are aged under 35, and 32 per cent are led by people aged under 35. This also reflects global patterns more widely. [10]

Leadership demographics

Organisation owner/leader	
Female	35%
From a minority ethnic group or marginalised community	10%
Aged under 35	20%
Aged over 60	6%

Youth and female-led respondents by region

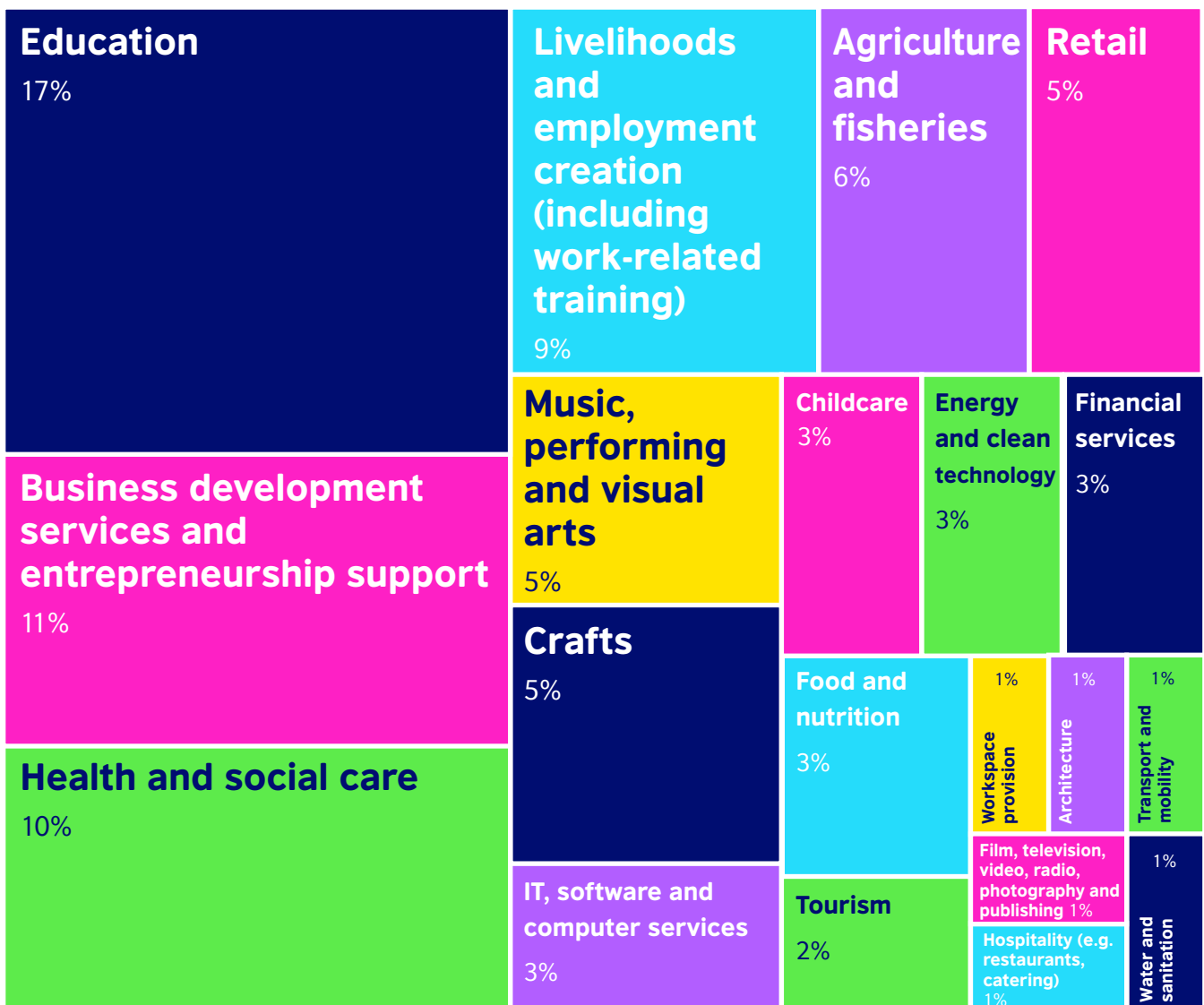| Organisation owner/leader	Sub-Saharan Africa	South East Asia	South Asia	Europe+
Female	49%	56%	55%	13%
Aged under 35	38%	29%	33%	6%

[9] www.britishcouncil.org/society/social-enterprise/reports/state-social-enterprise

[10] www.britishcouncil.org/society/social-enterprise/reports/state-social-enterprise

We also looked at the core activities and social/environmental missions of the social enterprises. Across the surveys, we received most responses from social enterprises in the education, business development, and health and social care sectors.

By region, agriculture and livelihoods/employment creation are particularly important in sub-Saharan Africa. Education comes top in Europe+, followed by health and social care then retail. Education, health, energy/clean tech and business development are equally cited in South Asia as the most common sectors from respondents. South East Asia has most responses from social enterprises focused on livelihoods, followed by education and crafts.

Primary sector of operations

Education
17%

Livelihoods and employment creation (including work-related training)
9%

Agriculture and fisheries
6%

Retail
5%

Business development services and entrepreneurship support
11%

Music, performing and visual arts
5%

Childcare
3%

Energy and clean technology
3%

Financial services
3%

Health and social care
10%

Crafts
5%

Food and nutrition
3%

Workspace provision 1%

Architecture 1%

Transport and mobility 1%

Film, television, video, radio, photography and publishing 1%

1%

IT, software and computer services
3%

Tourism
2%

Hospitality (e.g. restaurants, catering) 1%

Water and sanitation

We asked social enterprises which social mission they are focused on in relation to the Sustainable Development Goals (SDGs). SDG 8: decent work and economic growth came first, followed by SDG 3: good health and well-being, then SDG 4: quality education, with SDG 1: no poverty cited fourth most.

By region, the most cited in both sub-Saharan Africa and South East Asia is SDG 8, in Europe+ it is SDG 3, and in South Asia it is SDG 1.

SDGs through core activities

SDG 8: decent work and economic growth
58%

SDG 1: no poverty
36%

SDG 5: gender equality
35%

SDG 10: reduced inequalities
35%

SDG 3: good health and well-being
50%

SDG 17: partnerships for the goals
28%

SDG 13: climate action
21%

SDG 2: zero hunger
21%

SDG 12: responsible consumption and production
21%

SDG 4: quality education
49%

SDG 11: sustainable cities and communities
24%

SDG 6: clean water and sanitation
16%

SDG 7: affordable and clean energy
12%

SDG 15: life on land 9%

SDG 9: industry, innovation and infrastructure
21%

SDG 16: peace, justice and strong institutions
15%

SDG 14: life below water 7%

How Covid-19 has affected social enterprises so far

Business operations shake-up

We asked organisations how Covid-19 had affected their business operations and found that most social enterprises have changed their operations in some way in response to the crisis.

Of the respondents, 36 per cent are running with the same model but different level of activity, most of these having reduced activity (26 per cent of the total), but some having seen demand for their products and services increase (ten per cent).

Half (50 per cent) have changed their business model, with only 11 per cent expecting to revert back to their previous way of working. Six per cent have a completely new business model as a result of Covid-19.

This means that over 90 per cent of social enterprises are running quite different businesses to the ones they operated pre-crisis, and for almost half this change is significant and may be permanent. This is a period of major change – and ongoing uncertainty.

Changes to business operations in response to Covid-19	
Running as pre-crisis, little or no change to business model (processes, products/services or income sources)	9%
Same model, reduced activity	26%
Same model, increased activity	10%
Changes to business model – plan to return to normal ASAP	11%
Changes to business model – unsure if/when this will change	26%
Changes to business model – permanent change	13%
Completely new business model	6%

Looking at how the crisis has affected business operations in different regions, we found that South East Asia sees the highest rate of change. Only three per cent are running as pre-crisis, and a higher proportion (39 per cent) have seen activities reduce.

Social enterprises in South Asia are comparatively static, with none reporting having completely changed their business model and 18 per cent running as pre-crisis. Fewer have increased activity (four per cent) and of those that have changed their business model, more plan to return to normal ASAP (21 per cent).

In sub-Saharan Africa, social enterprises are particularly likely to have a completely new model (ten per cent) and to have made permanent changes to an existing model (14 per cent).

In Europe+, figures are similar to overall averages, with social enterprises slightly less likely to have seen activities reduce (21 per cent).

How business operations have changed

For those who've seen their business operations change, we asked what that change has been. Responses show that 38 per cent of social enterprises have developed and introduced new products or services, indicating that innovation has been important to these businesses over recent months. Past research leads us to expect this,[11] but it is particularly important in times of crisis.

Unsurprisingly, adapting to operate online has been particularly important for social enterprises as direct social interaction has been limited to reduce transmission of Covid-19. Just over half of social enterprises (55 per cent) have moved (more) of their provisions or services online.[12]

We know that social enterprises are embedded in their communities and make a difference to those most in need through their 'business as usual'. During the crisis, they've done more. Thirty-nine per cent of respondents have implemented new or additional support to target those in need due to the pandemic. Five per cent of these have done this in spite of the fact that they've had to make staff redundancies in the same period.

On the other side, one per cent of social enterprises reported that they have shut down, while seven per cent have closed services or product lines temporarily. Given the magnitude of the crisis, this seems a positive indication of social enterprises' resilience, albeit closure rates are likely to be under-reported.

Business operation – changes as a result of Covid-19	
We now provide (more) products/services online	55%
We provide new products/services	38%
We provide reduced products/services	28%
We provide new/additional support directly targeted at those in need due to Covid-19	39%
We are temporarily closed	7%
We have shut down	1%

[11] See questions about new product/service delivery: www.britishcouncil.org/society/social-enterprise/reports/state-social-enterprise and www.socialenterprise.org.uk/wp-content/uploads/2019/10/Capitalism-in-Crisis-State-of-Social-Enterprise-Report-2019-1.pdf

[12] As mentioned above, Europe and parts of South East Asia have high levels of internet access, compared to parts of South Asia and much of sub-Saharan Africa, where it is more impressive that high proportions of social enterprises have been able to adapt to operate online: data.worldbank.org/indicator/IT.NET.USER.ZS?end=2019&start=2019&view=map&year=2017

We asked respondents to provide more detail of changes to their business model. Globally, several talked about how they have switched the ways they operate – not necessarily new products and services or new models, but different ways of doing the same things. It could be with new target customers or clients, or innovating to overcome other challenges this year has brought.

> ' We have had to pivot our model to focus on the very small amount of numbers that we can get made. As we have to focus on increasing sales on this small collection (to make up for the fact that our supply chain has collapsed) we are focussing more on wholesaling to independent retailers interested in supporting social enterprise (this is instead of main focus being direct to consumer which is how we previously operated). '
>
> UK social enterprise

> ' All of our programs have been moved online. We have been conducting training, research activities, and such all remotely. Interestingly, the pandemic has not really impacted our productivity. If anything, we feel like we have become more and more efficient but simultaneously in our training programmes for entrepreneurs, we have been recognising the role of in-person network development and how entrepreneurs could have benefitted much more from it if not for the pandemic. We try to make up for it through breakout rooms and such but still we feel that it's one of those things that's not replaceable by remote tools. '
>
> Pakistani social enterprise

Some social enterprises (in Europe and sub-Saharan Africa) told us that they have been able to use lockdowns or quieter times to implement plans and projects they'd struggled to find time for, pilot ideas and generally reflect on activities and direction.

A few social enterprises across the four regions noted that their business model is now proportionately more reliant on grants and voluntary income, and less reliant on trading income as a result of the crisis. This could be a risk to business sustainability if it is more than a short-term trend.

Sub-Saharan African social enterprises are more likely to have permanently shut down (two per cent) and responses from the region show the lowest levels of providing services and products online at 44 per cent, indicating that change has been more difficult here. Social enterprises in the region are slightly less likely to be providing new products or services too (37 per cent). This could be a reflection, in part, of less supportive operating environments.

None of the South East Asian social enterprises reported permanent shutdowns. The region also has one of the highest levels of innovation, with 43 per cent reporting that they are providing new products and services. In contrast to sub-Saharan Africa, this could be because social enterprises in this region tend to benefit more from government and other support infrastructure – or that some governments have more

effectively managed the consequences of the pandemic in parts of South East Asia. Quality of internet connectivity could also play a role in the regional variation.

At 59 per cent, South Asia has the highest rate of providing (more) products and services online. South Asian social enterprises have also been particularly likely to say they're providing additional support through the crisis, with the highest proportion of respondents by region who have provided new or additional services to support those in need due to the crisis (45 per cent).

The Europe+ region has high levels of providing new products and services (43 per cent) but also the greatest number of enterprises that have reduced products or services at 38 per cent. This indicates a particularly mixed picture about how the crisis is affecting social enterprises in this region – in turn, indicating that government support infrastructure is not necessarily a primary factor in resilience, at least in this region.

Business operation – changes as a result of Covid-19 (regional breakdown)	Sub-Saharan Africa	South East Asia	South Asia	Europe+
We now provide (more) products/services online	44%	53%	59%	57%
We provide new products/services	37%	43%	37%	43%
We provide reduced products/services	32%	31%	25%	38%
We provide new/additional support directly targeted at those in need due to Covid-19	38%	41%	45%	34%
We are temporarily closed	9%	10%	10%	5%
We have shut down	2%	0%	0%	2%

Effect of Covid-19 restrictions on movement and well-being

Knowing that the crisis has played out differently in different parts of the world, we asked respondents how the pandemic affected their businesses, specifically focussing on measures such as social (physical) distancing,[13] personal protective equipment (PPE) sourcing, self-isolation and illness, and travel restrictions.

Social (physical) distancing has limited product or service delivery for nearly two-thirds of social enterprises (57 per cent) and ability to support targeted groups for over half (52 per cent). Travel restrictions are affecting operations for a significant number (56 per cent). Supply chain difficulties are affecting just over a third (35 per cent) of respondents, likely to be closely correlated to those sourcing products and services from outside their local area to operate.

More positively, fewer organisations have been affected by unwell or isolating staff (18 per cent), and sourcing and providing PPE/sanitation doesn't seem to be a major problem, although it is still affecting operations for one in ten social enterprises.

[13] The survey used the term 'social distancing' but authors recognise that 'physical distancing' is a more accurate term to describe policies to limit coronavirus transmission between people.

Forty per cent of social enterprises reported that the Covid-19 crisis has negatively affected demand for their services or products, while 20 per cent have seen an increase in the demand for their services or products. In terms of sectors: business development, education and crafts report a negative effect on demand for products or services, whereas more health and social care organisations were likely to report that demand had increased, unsurprising given the nature of the crisis.

Ways the Covid-19 crisis is affecting social enterprise operations	
Social distancing has limited our product/service delivery	57%
Social distancing has affected our impact/ability to support targeted groups	52%
Sourcing and providing PPE and sanitation is affecting our operations	11%
Illness/self-isolation has affected our staff	18%
Demand for our products/services has decreased	40%
Demand for our products/services has increased	20%
Our supply chain has been negatively affected	35%
Travel restrictions are limiting our operations	56%
No direct effect	4%

Women-led social enterprises

Women-led social enterprises seem to have been more adversely affected by the crisis. This is also true of small and medium sized 'traditional' businesses globally[14]. More have seen activity reduce (30 per cent) and more have temporarily (ten per cent) or permanently (three per cent) closed. They are also much more likely to say that government support isn't available to them (44 per cent compared to the overall average of 38 per cent).

In spite of this, women-led social enterprises are more likely to have created new products or services (44 per cent) and they have similar growth expectations to the average.

Effect on staff

Nearly a third of social enterprises have had to make redundancies. Twenty-seven per cent of respondents have had to make some staff redundant due to the Covid-19 crisis, with a further five per cent expecting to have to make redundancies in the next three months. More positively, 41 per cent have retained all staff and six per cent expect to recruit in the next six months. Compared to 'traditional' small and medium sized businesses globally, social enterprises have been more likely to retain staff (33 per cent of these businesses have made staff redundant[15]), indicating that social enterprises might be more likely to prioritise protecting jobs as they respond to the crisis.

Number of staff permanently laid off since February 2020 due to Covid-19	
0[16] –5 staff	19%
6–10 staff	4%
11–20 staff	2%
21–49 staff	1%
50+ staff	1%
No, we have retained all staff for now	41%
No, but we expect to lay off staff in the next three months	5%
We have increased our staff	7%
We expect to hire staff over the next six months	6%
None of these	14%

Expected and actual redundancies by region are highest in sub-Saharan Africa, affecting close to half of all respondents (41 per cent). Existing and planned job losses in Europe+ were significantly lower (18 per cent compared to 32 per cent in the main survey), and European social enterprises are more likely to be planning recruitment (12 per cent compared to six per cent), although retention rates were slightly lower (36 per cent compared to 41 per cent).

Given that there is significant disparity between the scale of government support packages[17] – in particular with wage support to employers/employees – higher redundancy rates in Africa and lower rates in Europe would be expected.

[15] https://about.fb.com/wp-content/uploads/2020/07/Global_State_of_Small_Business_Report.pdf
[16] This should have read 1–5 staff – but given the structure of the question, it is assumed that no respondents who made zero staff redundant would have ticked this option
[17] www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19

Support: needed versus available

Government support options

At the start of the crisis, analysis from different countries identified that there was high risk to social enterprises of contraction and closure if they were not given support. In the UK, half of social enterprises were predicted to hit critical cash flow difficulties within four months without financial support.[18] Similarly, in Malaysia, it was estimated the 40 per cent of social enterprises would close without assistance.[19] Research in Viet Nam estimated the figure of social enterprises at severe risk even higher at 77 per cent.[20]

Globally, most national governments have provided some form of support to business in response to the Covid-19 crisis,[21] but there is significant diversity in terms of the types of measures, their effectiveness at sustaining and driving forward business – and of particular interest to us – how accessible and appropriate they are to social enterprises.

We asked survey respondents about the types of government support they've been able to access – and difficulties they've faced with government support options.

Over a third of social enterprises globally (38 per cent) said that no government support measures are available to them. Only 18 per cent of UK social enterprises said the same.[22] This shows both that the degree of government support is highly varied – but also that even in countries with the highest levels of state support, there is still a gap in provisions for social enterprises.

Support to pay staff salaries is the most frequently cited form of government support (38 per cent), followed by grants (32 per cent), then new loans (17 per cent). Pauses in debt payment and taxation are less cited, as is support to hire new staff (nine per cent).

Government support measures used or will use	All respond-ents	Sub-Saha-ran Africa	South East Asia	South Asia	Europe+
Debt payment pause supported by government	9%	9%	16%	17%	2%
New loans supported by government	17%	22%	15%	20%	19%
Remove, freeze or reduction of tax or contributions to social security schemes	8%	10%	12%	7%	8%
Extension of tax or business reporting period	13%	16%	21%	20%	8%
Grants	32%	40%	48%	22%	42%
Support to pay staff salaries	38%	22%	33%	24%	34%
Support to hire staff	9%	4%	16%	11%	10%
No government support available	38%	45%	31%	56%	36%

As seen above, lack of government support is most acute in South Asia (56 per cent of respondents report that none was available to them) and sub-Saharan Africa (45 per cent), whereas South East Asian social enterprises were least likely to say that no government support was available.

[18] www.pioneerspost.com/news-views/20200427/five-weeks-cash-could-run-out-half-uk-social-enterprises-warning-chancellor
[19] www.freemalaysiatoday.com/category/nation/2020/03/26/40-of-startups-may-fold-if-covid-19-prolongs-till-raya-says-survey
[20] vietnam.opendevelopmentmekong.net/announcements/csip-announced-survey-report-impacts-of-the-covid-19-pandemic-on-social-impact-generating-enterprises
[21] sewfonline.com/home/building-capacity-and-capability/global-response-to-coronavirus and see footnote 14
[22] Analysis of SEUK SEAP results: www.socialenterprise.org.uk/social-enterprise-advisory-panel

Access to grants is highest in South East Asia too (48 per cent) and support with paying staff salaries and hiring staff is also cited at similar levels to that of Europe+, significantly more so than in South Asia and sub-Saharan Africa.

Debt payment holiday measures seem to be more significant in South Asia (17 per cent) compared to other places, although overall access to support in this region seems limited.

Social enterprises in Europe+ report the lowest levels of accessing debt payment pause measures (two per cent), the lowest levels of tax or business reporting period extensions (eight per cent) – perhaps because more lucrative measures in the form of grants and salary support are available. They report the highest levels of accessing measures to support paying staff salaries (34 per cent).

We asked respondents to expand on their experiences of government support in the country they are reporting on. The most cited difficulty was a general lack of support available, with support relevant and available to social enterprises specifically being the second most cited concern.

This shows both generic and specific support measures are a concern but also that the extent to which social enterprises can access mainstream measures is too often forgotten, and that specific social enterprise support is secondary.

In several countries, awareness and understanding of often complex and fast-changing government support has been a factor in accessing it,[23] as has capacity within an organisation to respond to multiple grant funding applications or to review detail of government support provisions.

Several social enterprises also mentioned that overloaded and/or complicated systems leading to slow or no responses, combined with lack of clarity or transparency, were limiting access to support that is available in theory.

> **Unemployment payments to staff – the system has been hard to access due to overload in requests. For grants [...] we are awaiting opportunities for social enterprise development organisations like ourselves, those offered did not pay staff.**
>
> South African social enterprise

Being an early stage social enterprise also presents additional barriers to accessing support.

23 Further validated by this research: www.freemalaysiatoday.com/category/nation/2020/03/26/40-of-startups-may-fold-if-covid-19-prolongs-till-raya-says-survey

Non-government support

We also asked about non-government support options. Just over a third of social enterprise respondents have accessed non-government grant funding (35 per cent), slightly more than received state-supported grants. Based on responses to this survey, sub-Saharan African and South East Asian social enterprises seem much more likely to source grants from government, whereas in Europe+ and South Asia, non-government sources are more cited. This finding does not fully align with other research and anecdotal experience, and it would be interesting to explore further whether this result is an anomaly or if there is something new happening.

It could be that this is due to a higher presence of trusts and foundations who understand social enterprise in Europe and South Asia compared to the other two regions, where understanding of social enterprise is maybe a bit newer. More analysis is needed to understand this as it's a somewhat surprising result, particularly for Africa.

Non-state loans were less popular than those provided/supported by governments at seven per cent (compared to 17 per cent) and rates of organisations accessing equity/quasi-equity were low (three per cent), particularly in sub-Saharan African (none) and South East Asia (two per cent).

Almost two-thirds of social enterprises have used online webinars, courses, and expert advice (65 per cent), by far the most commonly cited source of support of any type. These were least popular in Europe+ (59 per cent) and most popular in sub-Saharan Africa (70 per cent).

Social enterprises have also been supported by volunteers (22 per cent), and through pro bono business support or advice (20 per cent), and to a small extent by crowdfunding (15 per cent).

Covid-19 related support accessed from non-government sources since the start of the crisis	All re-spondents	Sub-Saha-ran Africa	South East Asia	South Asia	Europe+
Grants	35%	21%	29%	41%	59%
Loans	7%	5%	4%	11%	7%
Equity/quasi-equity	3%	0%	2%	8%	5%
Crowdfunding	15%	4%	21%	30%	14%
Pro bono business support/advice	20%	19%	19%	16%	18%
Volunteer support	22%	16%	23%	27%	18%
Online webinars, courses, expert advice	65%	70%	65%	62%	59%

Additional sources of non-government support mentioned include donations, networks and founders/owners relying on their personal savings or friend and family connections. Some respondents also noted the value of existing funders responding to revised needs caused by the crisis.

> **Co-founders have invested cashflow.**
>
> **Nigerian social enterprise**

> **We were also fortunate that our funders were willing and encouraged us to repurpose funding.**
>
> **South African social enterprise**

Support needs

We asked respondents to rank seven support options according to what they need most at the moment. Globally, connecting with funders ranked highest importance, and this was specifically the case in South Asia, and for women-led social enterprises. All geographies ranked this in the top two. Europe+ ranked lobbying government first – likely a reflection of governments in that part of the world putting in significant multi-billion-pound support measures, the functioning of state (democratic) processes and thus the perceived potential effect from lobbying. South East Asia and social enterprises led by people aged under 35 ranked guidance on running their business during Covid-19 first. Connecting with peers was the lowest priority across the board, only in Europe+ and South East Asia did it not rank in the bottom two.

South East Asian respondents valued guidance first and were particularly unlikely to rate in-kind support as useful. In Malaysia, research conducted in March 2020[24] found that 35 per cent of social enterprises needed loans, while 24 per cent asked for grants or subsidies and four per cent asked for deferment in repayments. The majority surveyed wanted some form of financial assistance to tide over the economic uncertainty; 20 per cent highlighted a need for assistance in marketing, business matching and market access, as well as capacity or capability-building programmes.

	All respondents	Sub-Saharan Africa	South East Asia	South Asia	Europe+
1	Connect with funders/investors	Connect with funders/investors	Guidance on how to run your business during Covid-19	Connect with funders/investors	Lobby government to get support for social enterprises during Covid-19
2	Guidance on how to run your business during Covid-19	Guidance on how to run your business during COVID-19	Connect with funders/investors	Lobby government to get support for social enterprises during COVID-19	Connect with funders/investors
3	Lobby government to get support for social enterprises during COVID-19	Lobby government to get support for social enterprises during COVID-19	Connect with temporary staff/ volunteers	Guidance on how to run your business during COVID-19	Guidance on how to run your business during COVID-19
4	Webinars on a range of practical topics (e.g. digital working, insurance, loan financing, etc.)	Webinars on a range of practical topics (e.g. digital working, insurance, loan financing, etc.)	Webinars on a range of practical topics (e.g. digital working, insurance, loan financing, etc.)	Connect with temporary staff/ volunteers	Connect with peers across the region/ globally
5	Connect with temporary staff/ volunteers	Connect with temporary staff/ volunteers	Connect with peers across the region/ globally	Webinars on a range of practical topics (e.g. digital working, insurance, loan financing, etc.)	Connect with offers of in-kind support
6	Connect with offers of in-kind support	Connect with offers of in-kind support	Lobby government to get support for social enterprises during COVID-19	Connect with offers of in-kind support	Webinars on a range of practical topics (e.g. digital working, insurance, loan financing, etc.)
7	Connect with peers across the region/globally	Connect with peers across the region/ globally	Connect with offers of in-kind support	Connect with peers across the region/ globally	Connect with temporary staff/ volunteers

24 www.freemalaysiatoday.com/category/nation/2020/03/26/40-of-startups-may-fold-if-covid-19-prolongs-till-raya-says-survey

Youth-led social enterprises

Social enterprises led by people aged under 35 are more likely to have completely new business models (ten per cent compared to the overall average) and to have innovated with new products and services (44 per cent). They also provided (more) products and services online (57 per cent). They are more likely to have seen demand for products and services increase (27 per cent), and less affected by supply chain disruption (29 per cent) and travel restrictions (52 per cent). They have made fewer redundancies (24 per cent have made redundancies, compared to 27 per cent overall average) and are more likely to retain (45 per cent) or expect to grow their staff (ten per cent).

However, they are more likely to have reduced products and services (32 per cent) or to have temporarily closed (ten per cent), and physical distancing has had a larger effect on their ability to support target groups (55 per cent).

In terms of support, social enterprises led by under 35 year olds are much more likely to say that government support isn't available to them. They're more interested in volunteer support and less interested in webinars than the average.

Concerning growth expectations, slightly more expect to remain in a similar position or grow (39 per cent compared to 37 per cent overall average), and more are uncertain about the future (51 per cent compared to 44 per cent on average).

Social enterprises and the future

Growth expectations

We asked social enterprises what their growth expectations are for the next three to six months. We then looked at those who expected to maintain a similar position or to grow staff and turnover to see if there are particular variables which seem to contribute to resilience.

Three per cent of social enterprises expect to close in the next three to six months. A further 13 per cent of respondents anticipate they will face reduced income and/or lose staff.

However, over a third expect to keep their business running as usual or to grow their turnover and staff numbers, indicating that there is resilience – and hope – in the sector.

Almost half are uncertain about their growth expectations as they await pending funding applications, income, and contracts (44 per cent, 48 per cent if 'don't know' responses are included). This figure underlines the importance of support to the future of social enterprise.

Growth expectations for the next three to six months	All respond-ents	Sub-Saha-ran Africa	South East Asia	South Asia	Europe+
We expect to close	3%	1%	0%	4%	2%
We expect income to reduce and/or to lose staff	13%	16%	22%	5%	11%
Uncertain – depends on the outcome(s) of pending funding applications/income/contracts	44%	48%	45%	39%	40%
We expect to maintain a similar position to now	23%	15%	23%	33%	26%
We expect to grow staff and turnover	14%	15%	10%	14%	19%
Don't know	4%	6%	22%	5%	2%
Static/growth position	37%	30%	33%	47%	45%

Of all regions, South East Asia is particularly pessimistic about growth, with 22 per cent of respondents reporting that they expect income to reduce and/or to lose staff in the coming three to six months but none expect to close.

Sub-Sahara African social enterprises have the highest rate of uncertainty due to pending funding, income, and contracts (48 per cent), perhaps reflecting the harsh operating environments they might face. However they also have the second highest (15 per cent) rate of expecting to grow staff and turnover. Social enterprises in this region report the lowest expectation of maintaining a similar position (15 per cent.

South Asian respondents are the most optimistic about growth, the most likely to expect their position to remain static, but also have the highest expected closure rates at 4 per cent.

Enterprises in Europe+ are second most optimistic about the future of their social enterprises after South Asia.

Resilience

We looked specifically at social enterprises who reported that they expect their business to remain in a similar position or grow in the next three to six months to understand more about the variables which seem to improve resilience in this crisis.

IT, software and computer services, and childcare sectors were most likely to report static or positive growth expectations, with food and nutrition, and health and social care also as likely as not to report stability or growth. At the other end of the spectrum, tourism, hospitality, and films, television, radio, photography and publishing were least optimistic about growth.

Social enterprises working with the public sector, other businesses and non-profit organisations are all more positive about growth compared to those engaging with vulnerable/disadvantaged groups as target clients and/or beneficiaries, and particularly those targeting women, who were least optimistic about growth. This underlines concerns that the crisis is exacerbating existing inequalities.

Comparing those more positive about growth to the total responses, larger organisations are notably more optimistic. Sixty-two per cent of organisations with 251–1,000 staff expect static or positive growth, compared to 33 per cent of those with 0–50 staff.

Looking at the link between gender and growth perceptions, organisations with more than 50 per cent female staff were more optimistic about growth than the average. But female-led organisations were significantly less optimistic (only 24 per cent).

Social enterprises with more than 50 per cent staff aged under 35 reported similar levels to the average, but those led by people aged under 35 were significantly less likely to anticipate static or positive growth – compared to those led by people aged over 60 who were much more positive (44 per cent compared to 26 per cent).

Looking at what changes to business model indicate about resilience, unsurprisingly those that report reduced activity are least likely to anticipate growth. Similarly, those uncertain about when or if changed business models will revert back to how they operated pre-crisis are less optimistic about stability or growth. Those with a completely new business model as a result of Covid-19 are by far the most optimistic group – 81 per cent anticipate stability or growth in the next few months. Second most resilient are those social enterprises who haven't changed their business operations in response to the crisis (51 per cent of this group expect stability or growth).

In terms of specific business changes most associated with growth, new or increased products and services online and innovation in the form of new products and services are the two factors most cited.

Providing new or additional support directly targeted at those in need due to Covid-19 is more closely associated with negative growth expectations, indicating that more resilient organisations have perhaps focused more on their own survival and those that have supported people beyond their normal targets have done so at their own expense.

Unsurprisingly, organisations expecting stability or growth are much more likely to have increased staff and to be anticipating recruiting in the next six months. They are also less likely to have made redundancies.

In terms of whether the crisis has affected business activities, organisations expecting stability or growth are far less likely to report an effect as a result of the crisis itself, and are particularly less likely to cite supply chain disruption and PPE obstacles as concerns. They are more likely to report increased demand for products and services.

Interestingly, government support does not seem to be a significant factor in positive growth expectations, with less than a third of those citing some form of government support anticipating stability or growth (meaning that most of those in receipt of government help are not so positive, expecting to decline or close).

Organisations anticipating stability and growth are also less likely to have accessed non-governmental support, with loans least popular proportionately to overall averages, and pro bono business advice most likely to have been used. It then follows that organisations more positive about growth are slightly less likely to prioritise lobbying government as a support need. Like the overall average, connections to funders/investors are the most cited support need, second is guidance on how to run their business during the pandemic.

Stories of resilience

We asked respondents to tell us about successes they've achieved in the face of the crisis. Many mentioned funding wins and just the ability to survive the crisis as a success.

'Our new product range shift, which is temporary, has given a scope to retain all employees without any pay cut and above all given us a new horizon to explore besides the core business. With regularised operations in spite of all odds and challenges, our team has been really supportive and as a whole has been appreciative and commendable. '

Indian social enterprise

'We launched a campaign to train volunteers to tutor kids (remotely) and we successfully onboarded +30 volunteers to accompany +300 leaners from +33 Moroccan cities. We also got (funding proposals) accepted to impact +500 new kids and +100 teachers. '

Moroccan social enterprise

Others cited examples of being able to find positives in adversity – for some, this was an opportunity to identify new (and better) ways of working or of reaching new people.

'We started a free digital skills training across 13 digital skills for job seekers and those who lost their jobs during Covid-19 lockdown, and am glad and proud to say that many have learned new skills and some landed interviews while a few got new jobs and a change of job. '

Nigerian social enterprise

'We have started to engage primary students across Jamaica online. We also went national for the first time with our kids' public speaking competition due to the fact that it was held online. '

Jamaican social enterprise

> **Covid-19 catapulted us into our future plans where we intended to offer programming online. It further shows us just how we had been moving to that goal even though we thought it was further off. We were able to offer the youth in our programmes online support and had interactive sessions across various intakes.**

South African social enterprise

> **We expanded 8+ new countries [...] we've collaborated with an NGO to bring quality play time to the refugee community during the lockdown (and) received three top-tier awards in our industry.**

Turkish social enterprise

The crisis has pushed people to be more creative, more innovative – more daring – than they might have been prior to the pandemic.

> **We've taken [the] opportunity in the slowdown of our daily operations to implement projects which were on the to-do list such as launching a co-operative for our artisans, expanding training for new craft community groups and launching a conservation project.**

Sri Lankan social enterprise

> **This lockdown made me think out of the box and because of this, my business will be expanding. We are taking the Engineering trades courses online to offer a practical platform to students and enhance this source of learning. By digitising this platform it gives the engineering trades and sector new life.**

South African social enterprise

> **The Covid-19 pandemic gave me an opportunity to rebrand and restructure my business.**

Ghanaian social enterprise

Several spoke about how the crisis has brought out an increase in community engagement and socially-minded business co-operation.

> **During the lockdown I cooked for the less privileged in my community.**

Ghanaian social enterprise

60 https://www.epa.gov/ghgemissions/global-greenhouse-gas-emissions-data
61 https://www.strategyand.pwc.com/media/file/Building-sustainable-inclusive-transportation-systems.pdf

‘In closing the doors to my catering business I decided to reach out to [another social enterprise] and offer pro bono communication and connection for them in New Zealand. This is a great opportunity for me to simply connect with new people and feel that I can be of use for another social enterprise.’

New Zealand social enterprise

‘We are happy to share that we've pivoted from producing footwear/lifestyle goods to producing PPEs in order to supply products for the "new normal". Our partner communities have steady income and are able to support their husbands who have lost their jobs (mostly as construction workers or tricycle drivers) during the pandemic.’

Filipino social enterprise

‘The entire community has come together to make things happen – and it is heartening to see this. Consumers are becoming increasingly aware and wanting to support local business, connections are increasing, and our beneficiaries are working with more passion than ever before.’

Indian social enterprise

‘Urgency with response to the crisis has provided motivation for stronger networking between our international networks. We also have developed ideas to support groups such as art workers by online services that remain to be implemented.’

Greek social enterprise

‘We pivoted during lockdown to become part of the solution in Malaysia by sewing PPE gear to support local hospitals and medical front liners.’

Malaysian social enterprise

Appendix 1:

Methodology and response rates

Primarily using contact details (emails and phone numbers) collected in previous State of Social Enterprise research, SEUK and British Council sought to reach social enterprises around the world to gather headline information on how social enterprises are faring during the Covid-19 pandemic. A 19-question survey (see questions below) was circulated to direct contacts and promoted via social enterprise support organisations and social enterprise networks in 23 countries using email and SMS. It was also circulated on social media. The survey was predominantly circulated in English, but British Council support in individual countries allowed translation into Portuguese, Amharic and Vietnamese.

A total of 460 responses were received, of which a total of 334 were valid responses from social enterprises. Of these, 20 were non-English responses.

A high proportion of respondents did not identify as social enterprises, we suspect due in part of the structure of question two (see Appendix 4). As such, we confirmed that all those who did not meet this criteria initially were in fact not social enterprises. To achieve this, we used social media and other datasets to identify if they were a social enterprise: SEUK membership; whether they were a community interest company (CIC), co-operative, microfinance or social enterprise; clearly identifiable social/environmental mission; leadership identifiers – in terms of social entrepreneurship (e.g. award winners, fellowship schemes) and detail

about service delivery models. We also contacted those for whom sufficient online information was unavailable to confirm their statistics.

We have also cross-checked major outliers, for example on staff numbers, and have removed any information that is inaccurate.

Question 18 used ranking in the main global survey, but additional survey findings used did not rank responses to this question. We have reported on overall responses as well as rankings, but for convenience we have coded all non-ranked responses with a mid-point ranking.

In addition to the primary survey findings, this report also incorporates findings from two surveys conducted in a similar time-period asking similar questions – the Social Enterprise Advisory Panel (SEAP) in the UK, and a State of Social Enterprise (SOSE) survey in Singapore. See below for details. These surveys were not identical to the main global Covid-19 survey but where question and answer were identical or possible to fully align, they have been included and aggregated with findings to provide a large overall sample. Detail of significant distinctions in this information is provided below.

Results presented as percentages may not total 100% due to rounding or where percentage of respondents rather than responses has been used, or if an 'other', 'don't know' or 'refused' option has been removed for presentation of findings.

UK SEAP survey findings

UK SEAP findings have been included in the Europe+ and global findings. The information covers questions on staff numbers, growth expectations and changes to business operations.

UK survey findings show a much higher proportion of responses from organisations with under six staff, although all organisations with 251 or more staff are also UK-based.

Figures on changes to operations are broadly similar, although the UK SEAP findings show that slightly fewer UK social enterprises report reduced activity. Growth expectations are more positive for UK SEAP respondents. UK SEAP respondents report far less pivoting online and fewer new products and services.

Singapore SOSE survey findings

At the same time as this Covid-19 survey was completed, we were also completing a SOSE survey in Singapore. It therefore made sense to include Covid-19 questions from this survey in the main survey of this report. As a result, 143 responses to the Singapore SOSE survey are included in the South East Asia and global findings. The Singapore survey covers questions on leadership by age and gender, business operations, redundancies, government support and growth expectations.

Singapore social enterprises reported slightly lower rates of female leadership, much lower rates of leaders aged over 60 and collected no information on leaders from minority ethnic or disadvantaged group backgrounds. The only aligned information on client and beneficiary groups was on women, so women as beneficiaries are over-represented in the total regional findings.

In terms of government support, Singapore only reported on loans and support to pay staff salaries. For the Singapore findings, we have slightly aggregated the original findings making the assumption that initial information provided on leadership team demographics could serve as indicative information on overall leadership. We have also used the first alphabetic response to the sector question as a multi-selection was available, which means that the Singapore sector information will slightly over-represent sectors earlier in the alphabet.

Appendix 2:

A full list of countries from whom we collected responses

Country	Region	Total responses	Extra survey responses
Afghanistan	Other	1	
Bangladesh	South Asia	1	
Belgium	Europe+	1	
Brazil	Other	1	
Canada	Other	1	
China	Other	1	
Colombia	Other	1	
Ethiopia	Sub-Saharan Africa	3	
Georgia	Other	1	
Ghana	Sub-Saharan Africa	19	
Greece	Europe+	7	
India	South Asia	31	
Indonesia	South East Asia	2	
Jamaica	Other	15	
Kenya	Sub-Saharan Africa	19	
Malaysia	South East Asia	36	
Morocco	Europe+	9	
Myanmar	South East Asia	1	
Namibia	Sub-Saharan Africa	1	
Nepal	South Asia	1	
New Zealand	Other	2	
Nicaragua	Other	1	
Nigeria	Sub-Saharan Africa	28	
Pakistan	South Asia	22	
Philippines, the	South East Asia	34	
Rwanda	Sub-Saharan Africa	2	
Singapore	South East Asia	143	143
South Africa	Sub-Saharan Africa	15	
Sri Lanka	South Asia	3	
Sudan, the	Sub-Saharan Africa	2	
Thailand	South East Asia	1	
Gambia, the	Sub-Saharan Africa	1	
Turkey	Europe+	20	
Uganda	Sub-Saharan Africa	3	
UK	Europe+	294	261
United States of America, the	Other	2	
Viet Nam	South East Asia	7	
Zambia	Sub-Saharan Africa	3	

Appendix 3:

Distinctions from Europe plus findings for Morocco, and from overall findings for Jamaica

Morocco

Low return rates from North Africa has led us to aggregate our findings from Morocco with Europe. Not only was this due to its geographical proximity, but also as the findings were broadly aligned and there are no major outlying findings. However, there are a few minor exceptions which we detail here.

A higher proportion of Moroccan social enterprises are running completely new business models and Moroccan social enterprises were more likely than European counterparts to have moved their products and services online, and less likely to provide Covid-19-specific support.

Physical distancing, staff illness/isolating, and travel restrictions seem to have been more problematic in Morocco than in Europe. A higher proportion expect to close, although the number expecting to grow is also higher.

Moroccan social enterprises report less government support, with fewers grants and support with staff salaries – although tax relief seems to have been more available/useful in Morocco than in Europe. Outside government, grants are less cited as a support source in Morocco, whereas there has been more reliance on volunteers – and a much higher use of webinars and online support.

Jamaica

We received a few responses from the Americas but not enough for comparative analysis. The highest response rate was from Jamaica – these results are compared here against the global averages. Jamaican respondents reported fewer redundancies and greater likelihood that they'd be recruiting staff in the next six months.

Social enterprises in Jamaica are significantly more likely to have made permanent changes to their business model, but they are also far more likely to have reduced products and services or been forced to temporarily close than the global average. Also significantly fewer said they are providing products and services online. Supply chain disruption and travel restrictions have caused bigger problems for social enterprises in Jamaica than elsewhere since the crisis began.

Government support is significantly more limited in Jamaica, with most of those who responded to the question saying that there was no support available to them. Jamaican respondents have been more successful than the global average in securing non-government grants however, and report higher use of volunteer support, online guidance and pro bono support and advice.

Appendix 4:

Survey questions

1. What is the name of your organisation?

2. Which of these apply to you?
   a) We receive (or seek to receive) at least 25% of our income from trading
   b) We have a core social and/or environmental mission
   c) Neither of these directly apply

We'd like to know a bit more about your organisation

3. In which country are your (main/largest) operations?

(If you operate in more than one country, please select the country you'd like to focus on for this survey)

Please answer the remaining questions based on your operations in the country you selected in the last question

4. Which of these best describes your primary sector of operations?

5. Does your organisation seek to address any of the Sustainable Development Goals (SDGs) through its core activities? [tick all that apply]
   a) No poverty
   b) Zero hunger
   c) Good health and well-being
   d) Quality education
   e) Gender Equality
   f) Clean water and sanitation
   g) Affordable and clean energy
   h) Decent work and economic growth
   i) Industry, innovation and infrastructure
   j) Reduced inequalities
   k) Sustainable cities and communities
   l) Responsible consumption and production
   m) Climate action
   n) Life below water
   o) Life on land
   p) Peace, justice and strong institutions
   q) Partnerships for the goals
   None of these/Other

6. Which of the following are customers/clients/beneficiaries of your core products and services? [Tick all that apply]

        a) Public Sector/Government

        b) Businesses/other for profits

        c) Non-Profit Organisations/Charities

        d) Young people (under 35)

        e) Women

        f) Other vulnerable/disadvantaged groups

7. How many staff do you have at the moment?

        Percentage of staff

        Female?

        Under 35 years old?

8. What percentage of your staff are...

9. Is the owner/leader of your organisation?

        a) Female

        b) From a minority ethnic group or marginalised community

        c) Aged under 35

        d) Aged 60+

We want to understand how the COVID-19 crisis has affected your business so far

10. What's the situation regarding your business operations?

        a) Running as pre-crisis, little or no change to business model (processes, products/services or income sources)

        b) Same model, reduced activity

        c) Same model, increased activity

        d) Changes to business model – plan to return to normal ASAP

        e) Changes to business model – unsure if/when this will change

        f) Changes to business model – permanent change

        g) Completely new business model

11. If your business has changed as a result of COVID-19, do any of the following apply?

        a) We now provide (more) products/services online

        b) We provide new products/services

        c) We provide reduced products/services

        d) We provide new/additional support directly targeted at those in need due to COVID-19

        e) We are temporarily closed

        f) We have shut down

        g) Other (please specify)

12. Have you been forced to permanently lay off staff since February 2020 due to COVID-19?

      a) 0-5 staff

      b) 6-10 staff

      c) 11-20 staff

      d) 21-49 staff

      e) 50+ staff

      f) No, we have retained all staff for now

      g) No, but we expect to lay off staff in the next 3 months

      h) We have increased our staff

      i) We expect to hire staff over the next 6 months

      j) None of these

13. Is the COVID-19 crisis affecting you in any of the following ways?

      a) Social distancing has limited our product/service delivery

      b) Social distancing has affected our impact/ability to support targeted groups

      c) Sourcing and providing PPE and sanitation is affecting our operations

      d) Illness/self-isolation has affected our staff

      e) Demand for our products/services has decreased

      f) Demand for our products/services has increased

      g) Our supply chain has been negatively affected

      h) Travel restrictions are limiting our operations

      i) No direct effect

14. What are your growth expectations for the next 3-6 months?

      a) We expect to close

      b) We expect income to reduce and/or to lose staff

      c) Uncertain - depends on the outcome(s) of pending funding applications/income/contracts

      d) We expect to maintain a similar position to now

      e) We expect to grow staff and turnover

      f) Don't know

We want to understand the support that has been available to you since the start of the COVID-19 crisis

15. Have you or will you use any of the following Government support measures in your main country of operations/country you are reporting about? (tick all that apply)

      a) Debt payment pause supported by Government

      b) New loans supported by Government

      c) Remove, freeze or reduction of tax or contributions to social security schemes

      d) Extension of tax or business reporting period

      e) Grants

      f) Support to pay staff salaries

      g) Support to hire staff

      h) No Government support available

16. Please provide further information about Government support – what is available, how helpful/accessible it is to you/social enterprises generally, what more is needed

17. Have you accessed COVID-19 related support from non-Government sources since the start of the crisis?
  a) Grants
  b) Loans
  c) Equity/quasi-equity
  d) Crowd-funding
  e) Pro bono business support/advice
  f) Volunteer support
  g) Online webinars, courses, expert advice

18. What support do you need at this time?
  a) Guidance on how to run your business during COVID-19
  b) Connect with funders/investors
  c) Lobby government to get support for social enterprises during COVID-19
  d) Webinars on a range of practical topics (e.g. digital working, insurance, loan financing etc.)
  e) Connect with temporary staff/volunteers
  f) Connect with offers of in-kind support
  g) Connect with peers across the region/globally

And finally

19. Do you have a good news story to share?
New products/services, people you've helped, funding wins, staff achievements, positive feedback, volunteering work, new partnerships or contacts

Acknowledgements